

The «secrets» of King Crab and Snow Crab in Asia

- A peak into the South-Korean and Japanese markets

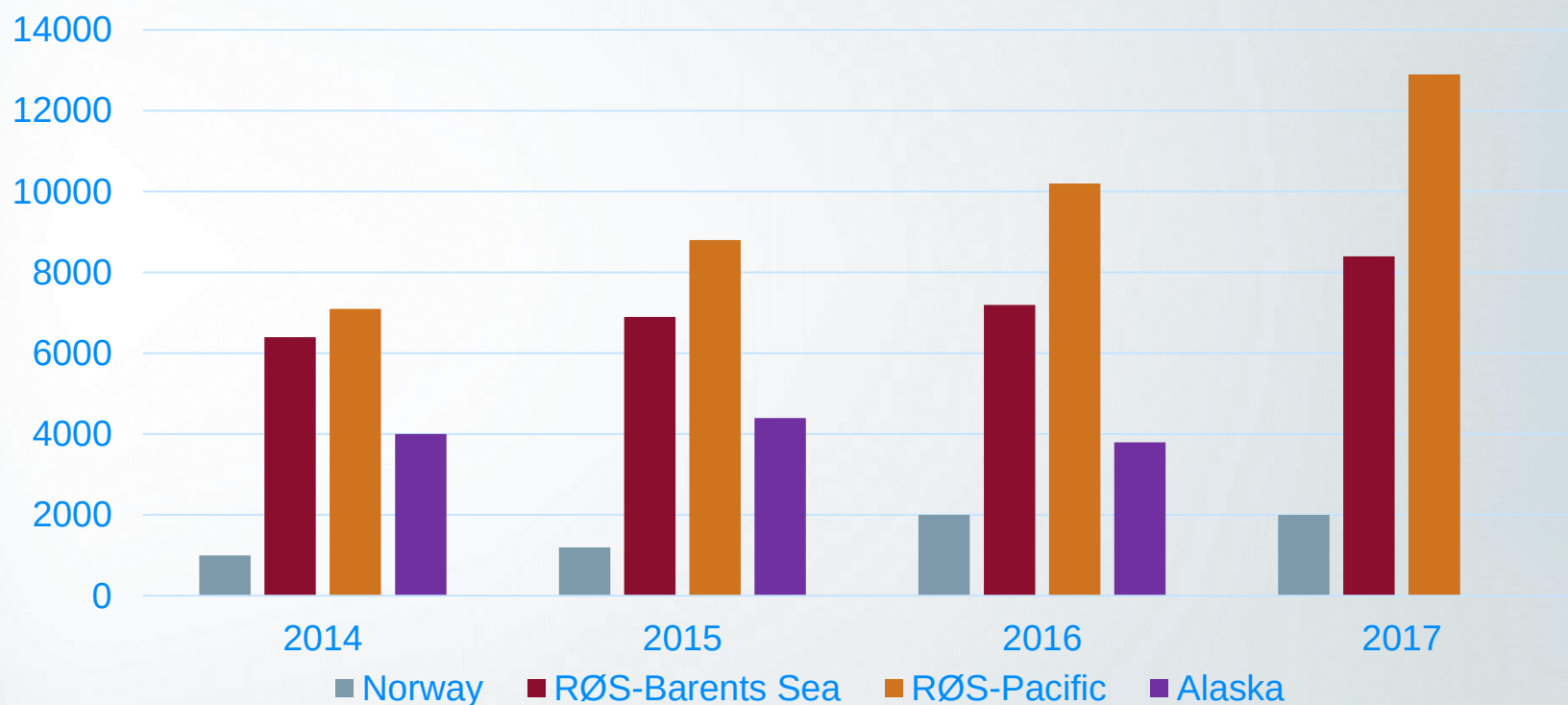


Gøril Voldnes

Data

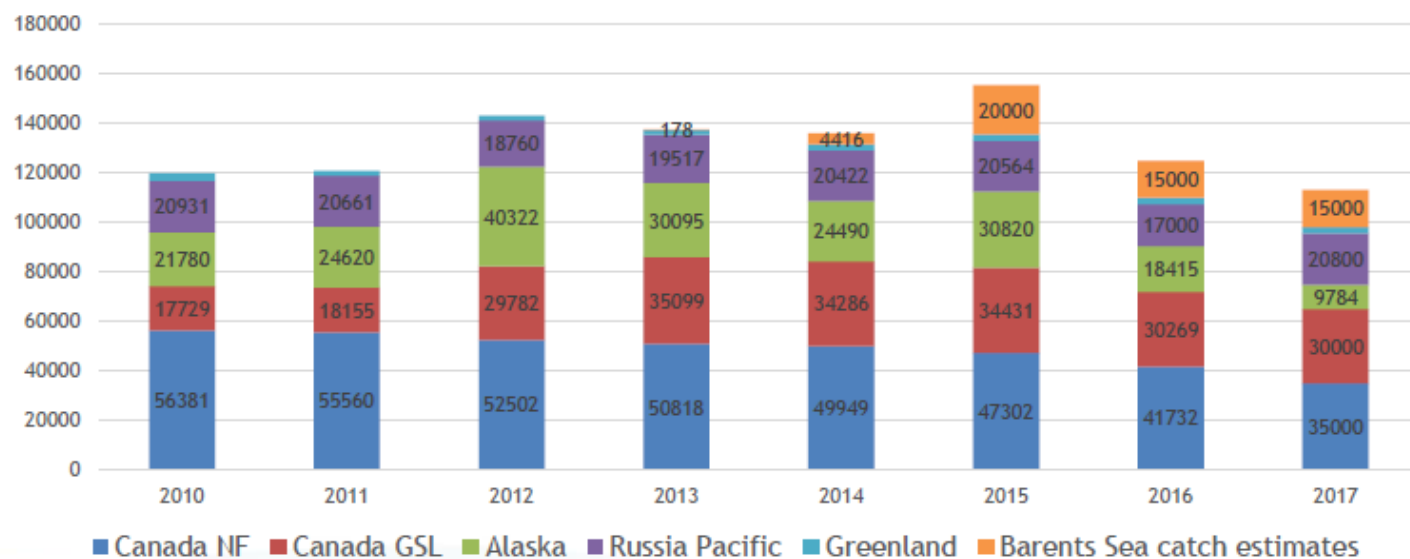
- Market study South-Korea and Japan
- Interviews
- Market observations
- Cooperation with Norwegian Seafood Council (NSC)
- Innovation Norway Korea
- Market reports from the NSC 2016/2017
- Market reports from the Norwegian Fishermen's sales organization

Global supply Red King Crab (RKC)



Source: The Norwegian Fishermen's sales organization

Global supply Snow crab (sc)



Source: Minato-Tsukiji Snow Crab report March 2015 + FAO Fishstat + DFO Canada



South-Korea

- 50 million people
- Capital Area Seoul, 24 million
- Transition hub – 40% re-export
- Annual seafood consumption: 58 kilo per capita
- Crab import increasing



Crab hierarchy South-Korea

- Total volume 2015: 74 300 MT (WFE)

Position		Crab Species	
High-end			
		Red King Crab	
Blue King Crab			
Domestic Snow Crab			
Mid-Level		Imported Snow Crab	
		Korean Swimming Crab	
Low-end		Red Snow Crab*	

Source: Norwegian Seafood Council's report : King and Snow crab in the South-Korean Market (2016)

Live crab market (RKC 88%, SC 62%)



Foto: Bjørg Nøstvold



Foto: Bjørg Nøstvold



Foto: Gøril Voldnes

Consumption

- “As-is”



Foto: Bjørg Nøstvold

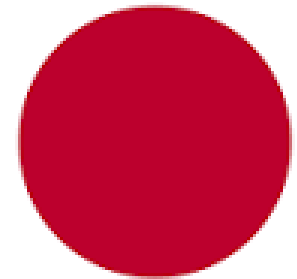
Supply



Foto: Gøril Voldnes

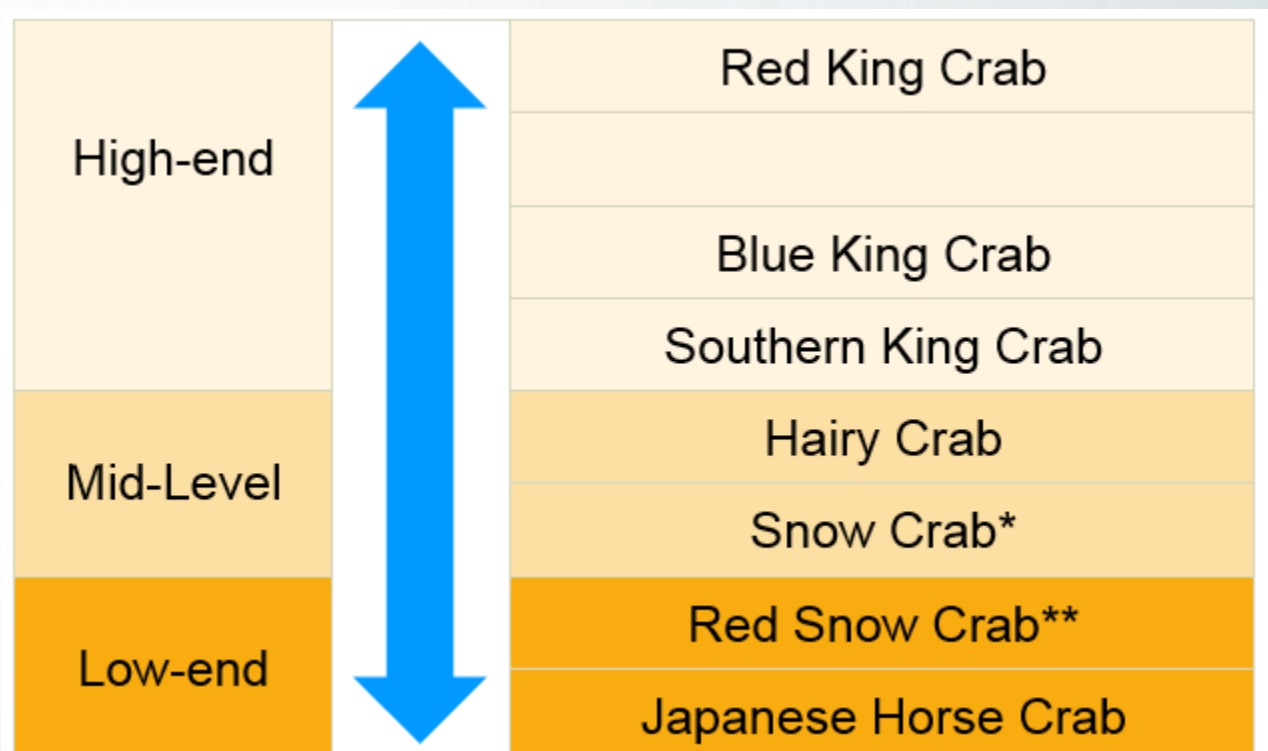
Japan

- 126 million people
- Capital Area Tokyo, 38 million
- Annual consumption of seafood: 53.7 kilo per capita
- Long tradition for eating crab
- Reduced crab import



Crab hierarchy in Japan

- Total volume in 2015: 77 671 MT (WFE)



Source: Norwegian Seafood Council's report : King and Snow crab in the Japanese Market (2016)

Frozen market (RKC 86%, SC 67%)



Foto: Gøril Voldnes

Large variety in retail

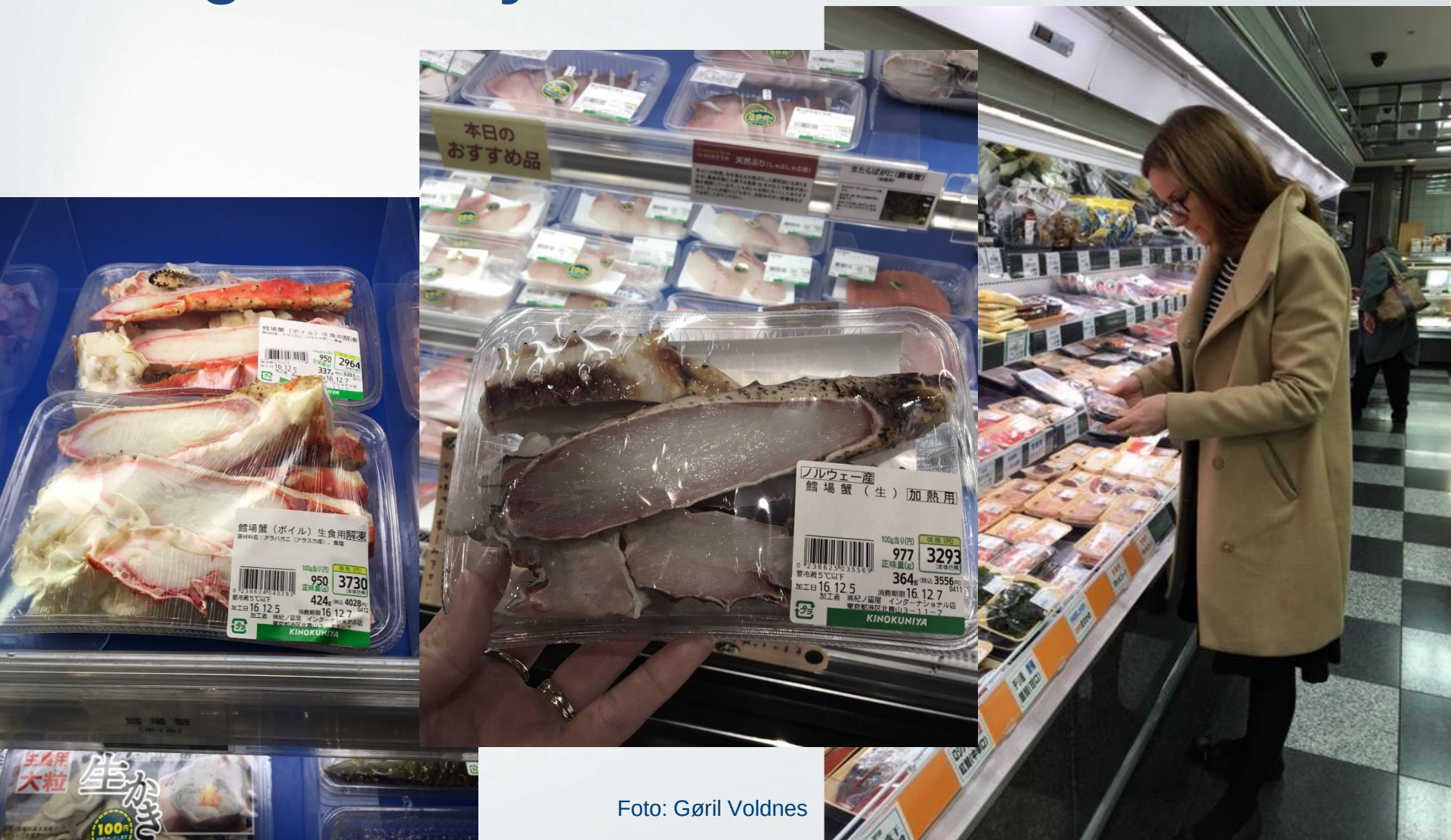


Foto: Gøril Voldnes

Also live crab...



Foto: Gøril Voldnes

Consumption



Foto: Gøril Voldnes





Foto: Gøril Voldnes

Supply

- Red King Crab
 - Russia, US and Norway
- Snow Crab
 - Russia, US, Canada, Norway, domestic

Summing up – Red King Crab

	Japan	South-Korea
Products	Frozen 86%	Live 88%
Major suppliers	1. Russia	1. Russia
	2. US	2. Norway
	3. Norway	
Distribution	Retail 55%	Retail 10%
	Food service 45%	Food service 90%

Summing up – Snow Crab

	Japan	South-Korea
Products	Frozen 67%	Live 62%
	Meat 23%	
Major suppliers	1. Russia	1. Russia 74%
	2. Canada	2. Domestic
	3. US	3. US
	4. Domestic	4. Canada
	5. Norway	5. Norway
Distribution	Retail 50%	Retail 5%
	Food Service 50%	Food service 95%



Thank you for your attention

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Funding: Norwegian Regional Research Fund North

